



## TEA BROKERS EAST AFRICA LIMITED

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### Tea Market Report: Sale 38 of 22nd - 23rd September 2025

Good general demand prevailed for the 113,075 packages (7,595,781.00 kilos) available in the market with 13.33 % remaining unsold.

#### Orthodox Grades (Outcry System)

**Offerings:** 1,755 packages (88,788.00 kilos) – 60.97% unsold.

*This week saw our industry mark a new chapter with an auction being held for Specialty and Orthodox teas of African origin, which received a fairly good reception and was conducted in the charming outcry method.*

#### Leaf Grades (M2 & M3)

**Offerings:** 56,720 packages (3,703,913.00 kilos) – 20.59% unsold.

#### **BP1:**

**Best** – Were more irregular ranging between USC42 dearer to USC28 below previous levels.

**Brighter** – More irregular interest varying between USC46 dearer to easier by up to USC69.

**Mediums** – KTDA mediums gained up to USC23 but select invoices shed up to USC8 while plantation mediums were well sought after advancing by up to USC23.

Country	Current and Future Fresh Auction Offerings							
	Sale 38 22 - 23 Sept'25		Sale 38 16 - 17 Sept'24		Sale 39 29 - 30 Sept'25		Sale 40 6 - 7 Oct' 25	
	MG	SG	MG	SG	MG	SG	MG	SG
Kenya	69,160	4,660	79,040	7,700	63,400	5,140	66,080	5,440
Uganda	8,040	5,980	5,800	4,439	8,720	6,680	9,720	7,060
Tanzania	0	0	1,940	340	0	0	0	0
Rwanda	4,560	320	4,560	580	5,720	420	4,960	600
Burundi	320	240	320	100	40	100	560	160
Zambia	0	0	0	0	0	0	0	0
Malawi	0	0	0	0	0	0	0	0
Madagascar	0	0	0	0	0	0	0	0
Zimbabwe	0	0	0	0	0	0	0	0
D R Congo	0	0	0	0	0	0	0	0
Mozambique	0	0	0	0	0	0	0	0
Ethiopia	0	0	0	0	0	0	0	0
Reprints	17,880	260	45,520	1,980	15,721	220	14,880	320
Total	82,080	11,200	91,660	13,159	77,880	12,340	81,320	13,260
	93,280		104,819		90,220		94,580	

**Lower Medium** – Lost by up to USC12 but select lines were firm to USC7 above previous rates.

**Plainer** – Appreciated substantially by up to USC22.

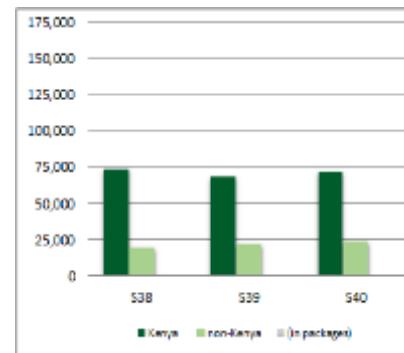
#### **PF1:**

**Best** – Met irregular interest varying between steady to USC12 dearer to mostly easier by up to USC24.

**Brighter** – Firm to easier by up to USC19.

**Mediums** – KTDA mediums were dearer by up to USC20 with plantation mediums appreciating by up to USC17 but select invoices shed by up to USC9.

**Lower Medium** – Were dearer by up to USC22 with select teas up to USC10 easier.



**Plainer** – Gained up to USC11 with select lines discounted by up to USC10.

#### **DUST Grades (M1)**

**Offerings:** 43,160 packages (3,214,290.00 kilos) – 16.03% unsold.

**continued ....**

**PDUST:**

**Best – Were dearer by up to USC64.**

**Brighter** – Saw improved enquiry and gained by up to USC58.

**Mediums** – KTDA mediums were firm to USC26 dearer to easier by up to USC5. Plantation mediums met strong support at USC11 dearer to easier by up to USC2.

**Lower Medium** – Steady to mostly dearer by up to USC10.

**Plainer** – Firm to USC5 above last rates to easier by up to USC6.

**DUST1:**

**Best – Steady to USC15 above previous levels.**

**Brighter** – Saw more interest and advanced by up to USC49.

**Mediums** – KTDA mediums were more irregular varying between USC26 above previous rates to easier by up to USC20. Plantation mediums saw irregular enquiry and ranged between mostly dearer by up to USC18 to easier by up to USC7.

**Lower Medium** – Gained by up to USC9 to easier by up to USC2.

**Plainer** – Irregular and varied between USC10 dearer to easier by up to USC9.

**Secondary Grades (S1)**

**Offerings:** 11,440 packages ( 582,790.00 kilos) – 4.55% unsold.

In the Secondary Catalogues, **BPs** gained while **PFs** held value. Clean well sorted coloury **Fan-**

nings were firm with **similar DUSTs** selling at about previous levels. **Other Fannings** held steady while **DUSTs** tended dearer. **BMFs** were well absorbed.

**Markets**

**Pakistan Packers** lent more enquiry with **Bazaar** active; **Egyptian Packers** showed strong support. **Yemen, other Middle Eastern countries** and **Afghanistan** maintained participation while **Kazakhstan** and **other CIS states** reduced interest. **UK** were more selective with **Russia** less active. **Sudan** were absent while **South Sudan** were active; **Local Packers** showed selective enquiry. **Somalia** lent good support at the lower end of the market.

**Mombasa Auction Hammer Market Analysis - Sale No 38**

Category (Band)	Percentage volume sold	Average Price ranges (for the marks within the category)				Min-Max Prices per grade					
		BP1		PF1		PD		DUST1			
		Min	Max	Min	Max	Min	Max	Min	Max	Min	Max
1 Best	83%	3.41	4.03	2.7	5.1	3.38	3.96	3.3	3.85	3.26	3.76
2 Below Best	79%	2.55	3.63	1.85	3.98	2.5	3.55	2.3	3.82	2.4	3.74
3 Good	83%	1.7	2.53	1.55	2.25	1.6	2.88	1.65	2.58	1.3	2.57
4 Best Medium	97%	1.55	2.01	1.48	1.81	1.68	2.19	1.55	2.02	1.61	1.69
5 Medium	83%	1.25	1.82	1.24	1.73	1.27	1.99	1.25	1.82	1.18	1.7
6 Lower Medium	98%	0.95	1.5	0.87	1.47	0.92	1.76	0.92	1.38	0.95	1.36
7 Plain	100%	0.99	1.45	0.98	1.42	0.92	1.6	0.94	1.4	0.93	1.05
<b>Totals</b>	<b>85%</b>	<b>0.95</b>	<b>4.03</b>	<b>0.87</b>	<b>5.1</b>	<b>0.92</b>	<b>3.96</b>	<b>0.92</b>	<b>3.85</b>	<b>0.93</b>	<b>3.76</b>
Category (Band)	Percentage of Total Sold	Average Prices per grade								Totals	
		BP1		PF1		PD		DUST1			
		Kgs	Avg	Kgs	Avg	Kgs	Avg	Kgs	Avg	Kgs	Avg
1 Best	7%	29992	3.92	188606	3.58	101780	3.62	44241	3.62	364619	3.62
2 Below Best	16%	135454	2.83	395821	3.2	206544	3.34	139046	3.28	876865	3.19
3 Good	45%	315983	1.82	1055917	2.22	918640	1.89	181952	1.86	2472492	2.02
4 Best Medium	13%	81676	1.64	248240	1.82	363464	1.78	22480	1.65	715860	1.77
5 Medium	9%	52684	1.45	156737	1.66	283168	1.63	24920	1.44	517509	1.61
6 Lower Medium	7%	52504	1.29	98887	1.18	154642	1.09	77911	1.09	383944	1.14
7 Plain	3%	37260	1.16	55920	1.05	68400	1.07	28180	0.98	189760	1.07
<b>Totals</b>	<b>100%</b>	<b>705553</b>	<b>1.98</b>	<b>2200128</b>	<b>2.35</b>	<b>2096638</b>	<b>1.98</b>	<b>518730</b>	<b>2.2</b>	<b>5521049</b>	<b>2.15</b>

### Average Auction Hammer Quantities and Prices by Country

Country of Origin	Main			Secondary			Total			Total for Corresponding Sale for Last Year		
	Pkgs	Kgs	USC	Pkgs	Kgs	USC	Pkgs	Kgs	USC	Pkgs	Kgs	USC
Kenya	72,200	5,097,665	216	4,540	244,542	129	76,740	5,342,207	212	64,860	4,441,956	210
Uganda	8,680	522,088	107	6,000	282,077	95	14,680	804,165	103	10,259	598,267	98
Tanzania	-	-	-	-	-	-	-	-	-	2,100	128,085	124
Rwanda	4,800	338,152	317	320	22,226	230	5,120	360,378	312	4,440	305,206	317
Burundi	80	5,940	211	220	10,896	132	300	16,836	160	720	43,864	197
Zambia	-	-	-	-	-	-	-	-	-	-	-	-
Malawi	-	-	-	-	-	-	-	-	-	-	-	-
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>85,760</b>	<b>5,963,845</b>	<b>212</b>	<b>11,080</b>	<b>559,741</b>	<b>116</b>	<b>96,840</b>	<b>6,523,586</b>	<b>204</b>	<b>82,379</b>	<b>5,517,378</b>	<b>201</b>
Sale Number	Previous Sale's Quantities and Prices									Total for Corresponding Sale for Last Year		
	Main			Secondary			Total					
Sale 37/25	79,600	5,529,597	213	12,520	644,237	121	92,120	6,173,834	204	90,065	6,046,760	201
Sale 36/25	81,900	5,717,264	210	12,640	646,656	114	94,540	6,363,920	200	86,539	5,728,801	201
Sale 35/25	81,640	5,683,768	205	13,220	672,047	112	94,860	6,355,815	195	86,195	5,789,936	206
Sale 34/25	85,961	5,980,253	207	13,529	690,944	114	99,490	6,671,197	197	89,800	6,032,073	205
Sale 33/25	88,382	6,155,543	218	12,921	660,887	110	101,303	6,816,430	208	93,659	6,314,733	215
Sale 32/25	88,400	6,103,615	217	15,000	767,158	111	103,400	6,870,773	205	94,880	6,382,596	211

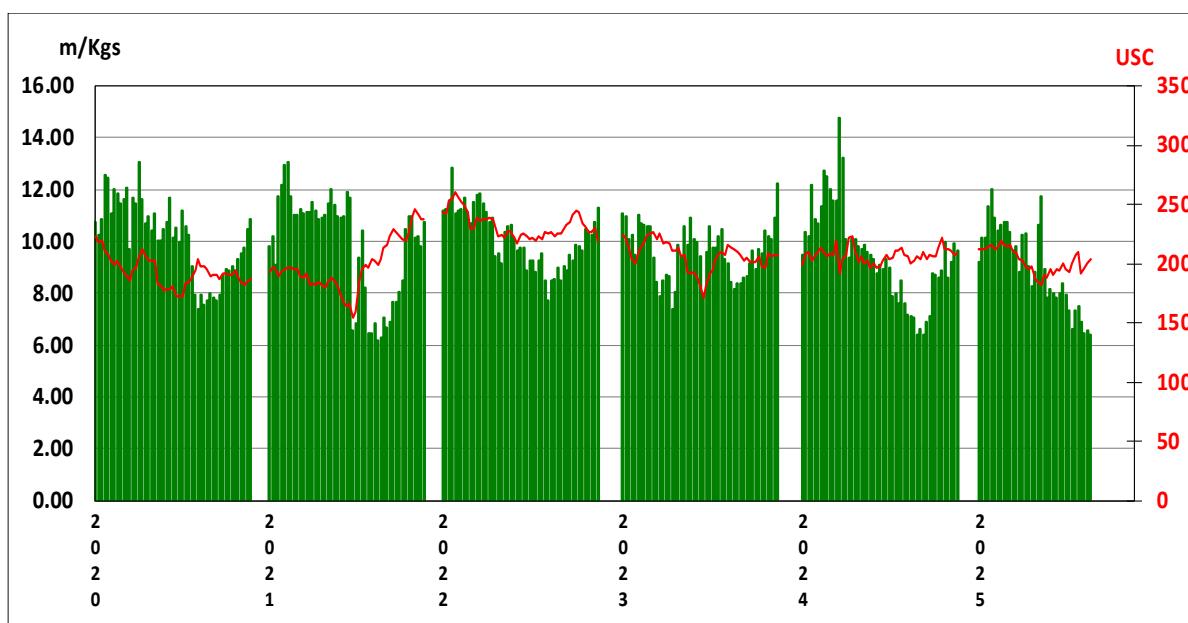
### Average Auction Hammer Prices by Grade and Country

Country of Origin	Current Sale's Prices per Grade										Corresponding Prices per Grade for Last Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Kenya	197	233	199	243	168	133	126	130	110	212	214	227	207	227	119	122	112	122	84	210
Uganda	120	107	104	103	105	103	101	92	91	103	121	103	112	112	82	85	83	72	65	98
Tanzania	-	-	-	-	-	-	-	-	-	-	98	122	136	-	82	93	60	-	66	124
Rwanda	301	333	303	305	261	-	202	233	-	312	339	324	352	310	204	225	205	181	84	317
Burundi	-	-	200	220	-	-	123	144	-	160	216	200	200	200	-	-	130	100	-	197
Zambia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Malawi	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Mozambique	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Madagascar	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Zimbabwe	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
D R Congo	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Ethiopia	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
	197	232	196	219	154	116	129	107	95	204	219	223	203	208	139	108	114	108	72	201
Sale Number	Previous Sale's Prices per Grade										Corresponding Prices per Grade for Previous Year									
	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av	BP1	PF1	PD	D1	BP/2	PF/2	D/2	F/1	BMF	Av
Sale 37/25	198	231	195	214	156	125	128	118	97	204	208	229	193	217	119	111	114	95	71	201
Sale 36/25	209	226	194	200	163	114	123	106	96	200	211	228	198	206	141	106	115	104	74	201
Sale 35/25	200	220	189	200	140	110	120	109	94	195	236	238	200	219	131	112	123	115	75	206
Sale 34/25	202	222	187	207	144	112	124	109	93	197	196	239	208	207	128	106	124	105	65	205
Sale 33/25	202	242	190	205	155	113	118	107	92	208	219	255	212	211	124	100	114	108	65	215
Sale 32/25	190	242	189	211	145	113	118	112	91	205	213	258	206	201	148	111	117	104	62	211

### Average Auction Prices and Quantities by Country

Country	Previous Sale Sale 37/25		Year To Date 2025		Last Year Sale 37/24		Year To Date 2024		Variance Year To Date	
	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC
Kenya	5,099,393	209	273,287,896	211	5,002,300	209	298,059,899	219	(24,772,003)	(8)
Uganda	796,383	102	35,530,581	76	709,975	99	39,477,715	80	(3,947,135)	(4)
Tanzania	-	-	2,342,593	93	19,689	104	3,320,915	75	(978,322)	18
Rwanda	487,790	309	21,292,900	180	375,976	327	23,537,164	285	(2,244,264)	(105)
Burundi	44,204	179	1,138,393	124	96,796	159	2,668,493	172	(1,530,100)	(48)
Zambia	-	-	-	-	-	-	-	-	0	0
Malawi	-	-	906,946	95	-	-	-	-	906,946	95
Mozambique	-	-	45,329	75	-	-	-	-	45,329	75
Madagascar	-	-	-	-	-	-	-	-	0	0
Zimbabwe	-	-	-	-	-	-	-	-	0	0
D R Congo	-	-	-	-	-	-	-	-	0	0
Ethiopia	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>6,427,770</b>	<b>203</b>	<b>334,544,638</b>	<b>193</b>	<b>6,204,736</b>	<b>203</b>	<b>367,064,186</b>	<b>207</b>	<b>(32,519,548)</b>	<b>(14)</b>

### Mombasa Weekly Average Auction Quantities and Prices 2020—2025



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	
	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC	Kgs	USC
2025	40.95	214	43.99	215	41.5	215	48.3	202	39.4	191	40.8	195	31.7	196
2024	53.1	205	47.37	210	49.9	206	52.9	217	39.1	202	36.1	198	43.1	206
2023	51.9	216	42.9	216	36.2	223	33.2	216	47.8	198	40.4	189	46.6	189
2022	46.8	249	45.19	255	57.0	236	44.3	238	49.0	220	40.1	223	37.1	222
2021	40.8	194	49.9	195	55.7	192	44.7	183	45.4	184	56.2	174	34.4	168
2020	44.4	217	47.41	203	56.5	192	46.9	205	42.5	189	53.0	181	42.3	176

### Exchange Rates (2023-2025)



During the week the Kenya Shilling traded between KES 128.00 - 129.50 and reached 128.03 at its lowest end week. Expectations are that the Kenya Shilling against US Dollar will trade at the level of 127.50 - 129.50 in the coming week.

*(These figures are given as a guide and readers are advised not to use them as a basis for business transactions)*

### Auction Quantities

Country Offerings	This Week Sale 38/25		Year To Date 2025		Year To Date 2024 Sale 38/24		Variance Year To Date	
	Packages	Kgs	Packages	Kgs	Packages	Kgs	Packages	Kgs
Kenya	73,820	5,128,362	4,239,809	294,029,159	5,002,715	344,032,823	(762,906)	(50,003,664)
Uganda	14,020	765,740	641,744	36,139,015	693,117	39,460,943	(51,373)	(3,321,928)
Tanzania	0	0	42,379	2,483,830	63,500	3,391,616	(21,121)	(907,786)
Rwanda	4,880	340,288	323,478	22,605,005	350,258	25,054,492	(26,780)	(2,449,487)
Burundi	560	33,356	47,296	2,779,499	50,800	3,043,697	(3,504)	(264,198)
Zambia	0	0	0	0	0	0	0	0
Malawi	0	0	19,838	1,112,085	0	0	19,838	1,112,085
Mozambique	0	0	1,000	46,219	0	0	1,000	46,219
Madagascar	0	0	0	0	0	0	0	0
Zimbabwe	0	0	0	0	0	0	0	0
D R Congo	0	0	0	0	0	0	0	0
Ethiopia	0	0	0	0	0	0	0	0
<b>Total</b>	<b>93,280</b>	<b>6,267,746</b>	<b>5,315,544</b>	<b>359,194,812</b>	<b>6,160,390</b>	<b>414,983,571</b>	<b>(844,846)</b>	<b>(55,788,759)</b>

### Buyer Purchases of Teas Offered by Grade (in Packages)

BUYER	%	Total	BP1	PF1	PD	D1	BP2	PF2	D2	FNGS	BMF
1 GLOBAL TEA & COMMODITIES KENYA LTD.	16.95	19,140	3,560	8,040	4,160	1,320		280	800	700	280
2 MITCHELL COTTS FREIGHT KENYA LIMITED	13.28	15,000	2,560	5,600	6,840						
3 L.A.B. INTERNATIONAL KENYA LTD	7.23	8,160	200	1,920	5,560	320		60	20	80	
4 ADITYA BIRLA GLOBAL TRADING (K) LTD	5.53	6,240	80	3,040	1,800	1,080	40		100	100	
5 MOMBASA COFFEE LTD	4.75	5,360	80	960	2,760	1,400	160				
6 JAMES FINLAY MOMBASA LIMITED	4.45	5,020	800	920	3,240		20				40
7 MIZAJ AFRICA LTD	4.02	4,540	320	2,880	1,040		220	80			
8 CHAI TRADING COMPANY LTD	3.90	4,400	840	2,040	360	480		340	340		
9 DEVCHAND KESHAVJI (K) LTD	2.37	2,680		2,680							
10 SUMMER LINER CO. LTD	2.21	2,500	240				160	400	40	920	740
11 M.J. CLARKE LTD	1.84	2,080		40	1,400	160		100	40	340	
12 ABBAS TRADERS LTD	1.63	1,840		600	800	240	20	40	100		40
13 ALIBHAI RAMJI (MSA) LTD	1.59	1,800	40	1,440	120	200					
14 AL-EMIR LIMITED	1.49	1,680	160	1,480		40					
15 DRINCO INTERNATIONAL LIMITED	1.42	1,600	1,600								
16 MAYMUN ENTERPRISES	1.24	1,400		1,400							
17 IMPERIAL TEAS (EPZ) LTD	1.04	1,180			680	320		20	60	100	
18 EMPIRE KENYA (EPZ) LTD	0.96	1,080		160	720	80		20	60	40	
19 SHAKAB IMPORTS EXPORTS CO. LTD	0.83	940	440	360	40	80	20				
20 LULA TRADING COMPANY	0.81	920	400				40	80		320	80
21 COFFTEA AGENCIES LTD	0.67	760		40	560	160					
22 AB EXPORTS KENYA LIMITED	0.60	680		480	40	40			120		
23 GREEN LEAF TRADING CO. LTD	0.58	660							20		640
24 BLACK GOLD AFRICA TRADERS LTD	0.50	560	40	160	160	80	20	40	60		
25 AFRO ASIAN TEA EPZ LTD	0.43	480	320	40				120			
26 FAJRI TEA PACKERS LIMITED	0.43	480									480
27 MCLEOD RUSSEL AFRICA LIMITED	0.43	480			160	320					
28 FICO TEA AND COMMODITIES LIMITED	0.35	400			240	160					
29 VAN REES KENYA LIMITED	0.35	400		160			240				
30 AL KHALIFA ENTERPRISES LTD	0.32	360								140	220
31 DELSTA TEA LIMITED	0.32	360	200	160							
32 IMTINAN TRADING CO LTD	0.32	360			280	80					
33 SARDIA INTERNATIONAL CO. LTD	0.25	280		200					20		60
34 TUSAH TEA LTD	0.25	280	280								
35 AXIS TEA & SERVICES LIMITED	0.23	260							80		180
36 SONDHII TRADING LIMITED	0.21	240					240				
37 AIMCO ENTERPRISES LTD	0.19	220									220
38 MOMBASA TEA TRADERS LTD	0.19	220	40		40	120	20				
39 TROPICAL CROPS & COMMODITIES	0.19	220			40						180
40 MAISHA COMMODITIES	0.18	200	80		80	40					
41 LINDOP & COMPANY (KENYA ) LTD	0.14	160		160							
42 MABROC EAST AFRICA LIMITED	0.14	160	40		120						
43 NALA TEA COMPANY LTD	0.12	140				80			60		
44 JOE AGRO LIMITED	0.11	120		120							
45 KIRINDO TRADERS LIMITED	0.11	120			40		20				60
46 TANZIL TRADING LIMITED	0.11	120								80	40
47 TEAVANA TEA STORE LTD	0.11	120									120
48 AL MAJANI GOLD AND KAHAWA LTD	0.09	100		80					20		
49 AFRO TEAS LTD	0.07	80	40		40						
50 LUTEX LIMITED	0.07	80				80					
51 TRANS-ATLANTIC TRADING Co. LTD	0.07	80			40				40		
52 FIRST CUP COFFEE LTD	0.04	40		40							
53 STANSAND (A) LTD	0.04	40	40								
54 GOLD CROWN FOODS (EPZ) LTD	0.02	20									20
Total Sold	85.75%	96,840	12,400	35,200	31,280	6,880	1,060	1,820	1,980	3,080	3,140
Unsold	13.33	14,900	5,280	3,960	3,960	1,320	0	80	220	80	0
% Unsold			30	10	11	16	0	4	10	3	0
Grand Total	100.00	111,740	17,680	39,160	35,240	8,200	1,060	1,900	2,200	3,160	3,140

Sale 36/25	78.02%	94,540	9,560	36,520	28,220	7,600	1,000	2,040	2,480	3,960	3,140
Sale 35/25	75.87%	94,860	10,440	36,700	27,040	7,460	1,360	1,960	2,500	4,040	3,360
Sale 34/25	65.41%	99,490	10,240	39,841	27,480	8,400	1,430	2,360	2,620	3,719	3,400
Sale 33/25	66.80%	101,303	8,320	44,620	26,802	8,640	960	2,080	2,500	3,780	3,601
Sale 32/25	67.95%	103,400	10,480	44,360	25,640	7,920	1,240	2,740	2,440	4,320	4,260
Sale 31/25	57.46%	94,640	9,520	35,760	27,420	8,460	1,340	2,200	2,280	4,540	3,120

### Other Tea Auction Centres

**C olombo:** at Sale 36 of 16th and 17th September, 2025, with 5.0mkg. 0.65Mkg of Ex-Estate teas on offer met with good demand. Select Best Western High Grown BOPs were irregular following quality; the below best and plainer varieties gained from last week's levels. Select Best Western High Grown BOPFs gained substantially following special inquiry, the below best and plainer varieties too were dearer. Nuwara Eliya BOPs/ BOPFs remained unsold. Uda Pussellawa BOPs were tending irregular, the BOPFs gained from last week's levels. Uva BOP / BOPFs were firm to dearer. Low Grown CTC BP1s maintained, the High and Medium sorts were irregular. Low Grown CTC PF1s were mostly firm on last levels, the High and Medium sorts were tending irregular. The 2.2Mkg of Low Grown teas on offer met with fair demand. In the Leafy segment, well-made OP / OPAs gained selectively, whilst the below best types met with irregular demand. OP1s were maintaining last week's price levels despite irregular demand. Well-made BOP1s were firm to lower, the below best along with the bolder types were irregular, rest were lower to last. Well-made PEKOE / PEKOE1s were firm to dearer. In the Small Leaf segment, well-made FBOPs were easier, others were irregular following quality. Select best and best FBOPF1s were easier, the others were firm. BOPF.SP, BOPF, BOP.SP and BOPs were firm. Very Tippy FBOPF varieties were firm, others were easier. Premium Flowery teas met with irregular demand. Turkey, Russia and the C.I.S countries lent fair support. Libya and Iraq were active

**C hittagong:** at Sale 19 of 15th September, 2025. CTC LEAF: 59,549 packages of tea on offer met with a fairly good demand. BROKENs: Well made good liquorizing Brokens met with a good demand and were mostly firm to occasionally dearer following competition. Medium varieties met with a fair demand and were about steady with some withdrawals. Plainer varieties met with less demand at around last levels and witnessed more withdrawals. BLF teas met with a fairly good market at around last levels with a few withdrawals. FANNINGS: Good liquorizing Fannings met with a good demand and were mostly firm to slightly dearer following quality. Medium varieties met with a fair demand at around last levels with a few

Centre	Auction Offerings			
	Week 37	Week 38	Week 39	Week 40
	16-Sep	23-Sep	30-Sep	07-Oct
Mombasa	111,420	111,420	106,161	149,133
Limbe				
Colombo	5.0m/kgs			
Calcutta	217,830	228,702		
Guwahati	172,714	205,003	-	-
Chittagong	59,549			
<b>Total</b>	<b>369,662</b>	<b>288,994</b>	<b>111,420</b>	<b>149,133</b>

withdrawals. Plainer varieties met with less demand at around last levels and witnessed more withdrawals. BLF teas met with a fairly good market at around last levels with a few withdrawals. DUST: 12,788 packages of tea on offer met with a fairly good demand. Well made good liquorizing Dusts met with a good demand and sold at around last levels. Mediums were barely steady. Plain/BLF Dusts witnessed less demand with heavy withdrawals. Blenders lent strong support with fair interest from the Loose tea buyers. COMMENTS: Market opened on a fairly good demand but gradually lessened with the progress of sale and witnessed little more withdrawals in the latter part. Blenders continued to lend good support for all varieties but Loose Tea buyers were selective. As a result, withdrawals were slightly higher this week. Dusts sold well.

228,702 packages of tea on offer. Market description: There was good demand. Good liquorizing Assams met with demand and sold around last levels. Medium Assams were barely steady. Better Dooars were irregular and sold around last to easier levels. Good Dooars sold around last levels following the quality. Plainer Dooars continued to struggle. Dust: Good Demand. Overall it was an easier market for all sorts. Western India buyers and Hindustan Unilever were active in both segments, primarily on brighter liquorizing Assams. M/s Tata Consumer Product Limited showed some interest on plainer Dooars and were active on Dust category. Local buyers operated on grainy, clean teas. Exporters operated on bold broken

**C ochin:** at Sale 38 of 17th September, 2025.CTC Leaf: Good Demand: Brokens sold firm to dearer 1-2c with some withdrawals depending on quality. Fannings dearer 3-4c. Buying pattern: Up country buyers operated. ORTHODOX Leaf: Good demand. High grown and other whole leaves sold firm to dearer depending on quality. Primary brokens appreciated 4-5c. Secondary brokens firm to dearer. Fannings fully firm. Buying pattern: CIS and Middle East Buyers operated. Dust : Good demand. Popular marks and better medium sorts fully firm. Plainer sorts fetched prices irregularly around last. Buying pattern: Major packeteers, exporters active. Internal operated

**C alcutta:** at Sale 38 of 16th, 17th and 18th September 2025 with

**G uwahati:** at Sale 38 of 16th September, 2025, with 205,003 packages of tea on offer. Market: CTC There was good demand for the good and better medium Assams at around last levels. Remainder were irregular and easier following quality. Brown /Plain varieties witnessed withdrawals. Buying Pattern: CTC. HUL ,Western India , North India and other upcountry buyers lent fair support .TCPL operated selectively on the medium and plainer varieties. Export enquiry was selective on the larger brokens. Market: DUST There was fair demand. Better liquorizing Assams were around last. Remainder were barely steady to easier and saw some withdrawals. Buying Pattern: DUST HUL/ TCPL lent fair support. Western India, other packeteers operated.

## Regional Weather Conditions and World Crop

**Kenya: Muranga:** The area experienced sunny intervals during the day with light showers at night. The rainfall recorded during the week was **7.5 mm** in 2 wet days. Cool temperatures were recorded, maximum 26°C and minimum 10°C. Crop intake was at an average of 78.99 tonnes/day on a six days plucking cycle.

**Nyeri:** The week was sunny. The rainfall recorded was **13.12mm** recorded in 1 day. The highest and lowest temperatures were 23°C & 12°C respectively.

Crop intake averaged 35.83 tonnes /day on a six days plucking cycle.

**Meru:** The weather was sunny and cloudy throughout the week. The rainfall recorded was **9mm** during the week. The average temperatures recorded were highs and lows of 27°C and 15°C respectively. Crop intake averaged 34.38 tonnes/day on a five day plucking cycle.

**Kericho:**

The week was partly sunny in the morning, followed by cloudy afternoon accompanied by moderate showers. A total of **41.2mm** rainfall was recorded. Average temperatures were highs of 23°C Celsius and lows of 10°C Celsius. Crop intake went up by 3% compared to previous week's volumes.

Crop on offer may drop due to reported hail damages.

**Uganda:** There was some good rainfall reported across most tea growing regions. Fort portal recorded **22mm**, Bushenyi recorded **83mm**, Hoima recorded **50mm** of rainfall and Kibale recorded **1mm** of rainfall. Average tempera-



*The trouble with weather forecasting is that it is right too often for us to ignore it and wrong too often for us to rely on it.*

tures were highs of 30° Celsius and lows of 16°Celsius.

Crop levels are low.

**Seven-day weather forecast for 23rd to 29th September 2025.**

Most parts of the country are likely to be sunny and dry. However, rainfall is expected in some parts of the Highlands East and West of the Rift Valley, the Lake Victoria Basin, the Rift Valley and Northwestern Kenya.

**Highlands East of the Rift valley.**

[including, Nairobi County] (Nyandarua, Laikipia, Nyeri, Kirinyaga, Murang'a, Kiambu, Meru, Embu, Tharaka )

Mornings are likely to be cloudy giving way to sunny intervals for the rest of the day. Nights are expected to be partly cloudy.

However, afternoon showers may occur over few places during the second half of the forecast period.

**Highlands West of the rift valley.**

The Lake Victoria Basin, and the Rift Valley (Siaya, Kisumu, Homabay, Migori, Kisii, Nyamira, Trans Nzoia, Baringo, Uasin Gishu, Elgeyo-Marakwet, Nandi, Nakuru, Narok, Kericho, Bomet, Kakamega, Vihiga, Bungoma, Busia and West Pokot Counties)

Sunny intervals are expected in the mornings though occasional rains may occur over few places. Afternoon showers and thunderstorms are expected over few places during the first half of the forecast period, increasing to several places thereafter.

Night showers are likely to occur over few places.

**The Coast:**

(Mombasa, Kilifi, Lamu and Kwale Counties as well as the coastal parts of Tana River County):

Sunny intervals are expected during the day while nights are likely to be partly cloudy during the first half of the forecast period.

**Kenya:**

The cold season still persists and the fields are slowly recovering from pruning. However there have been reports of severe Hail damage in Nandi Hills and Kapsabet area. Kericho and Bomet have also been severely hit by hail and as a result the crop on offer will drop further in the coming weeks

**Uganda:** Crop levels are low.

	World Production from Main Producing Countries over the Past Twelve Months												Production over calendar years			
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	+ / - Variance	2024	2023
Bangladesh	0.3	0.2	1.3	2.3	8.6	9.8	13.5	13.8	12.2	14.9	10.0	6.4	36.1	(72.0)	86.8	83.4
North India	0.1	11.0	52.1	73.0	104.4	112.5	151.4	163.0	141.6	174.4	123.5	11.1	504.4	(694.0)	1,044.0	1,131.8
South India	17.0	14.8	15.7	22.2	26.2	21.0	20.4	18.7	23.0	24.2	19.8	18.3	137.3	(109.0)	225.9	236.0
Sri Lanka	21.5	15.6	24.4	26.4	25.3	21.6	21.4	21.3	24.1	21.1	22.3	21.7	156.2	(126.0)	260.6	253.9
Kenya	54.4	44.6	37.9	51.8	52.1	42.4	39.0	38.6	42.4	50.2	41.4	55.8	322.3	(316.0)	596.9	570.2
Uganda	4.1	6.0	2.9	3.3	2.6	2.1	1.3	4.5	6.0	7.6	6.6	6.7	22.3	0.0	18.8	0.0
Tanzania	1.9	1.9	1.9	1.8	1.6	1.0	0.7	0.6	0.8	0.0	2.2	2.0	5.7	(4.0)	13.3	22.9
Rwanda	4.2	3.6	3.9	3.6	3.8	3.2	2.9	1.2	1.1	2.1	3.7	3.3	25.2	(16.0)	38.2	38.1
Malawi	5.3	6.7	6.1	6.8	4.4	2.1	1.4	1.4	2.6	2.6	3.2	4.0	34.4	(18.0)	45.8	43.4
Total	104.6	98.4	143.3	186.1	224.9	212.7	250.0	1.4	205.4	237.2	32.3	58.4	1,863.1	(1,355)	2,330.4	2,379.6
Variance	107.3	106.4	152.7	9.0	219.8	182.3	233.1	(8.8)	226.8	28.8	(16.6)	(50.2)	682.4			

Monthly figures in "BLACK" are for 2025 whilst figures in "BLUE" are for 2024

### Mombasa Auction—Weekly Sale Average Prices (All teas) 2025

Sale Nos.	Sale Date	Kilos sold Weekly	Kilos Sold monthly	Year : 2024		Year : 2025		Year : 2024		Year : 2023	
				Av. Price US\$ weekly	2.12	Av. Price US\$ monthly	2.14	Av. Price US\$ monthly	2.05	Av. Price US\$ monthly	2.16
1	06-Jan-25	9,226,607									
2	13-Jan-25	10,157,646			2.12						
3	21-Jan-25	10,199,876			2.17						
4	27-Jan-25	11,370,562			2.15						
			40,954,690								
5	03-Feb-25	11,995,472			2.16						
6	10-Feb-25	10,906,410			2.12						
7	17-Feb-25	10,431,210			2.13						
8	24-Feb-25	10,665,450			2.19						
			43,998,542								
9	03-Mar-25	10,745,502			2.16						
10	10-Mar-25	10,773,185			2.16						
11	17-Mar-25	10,376,206			2.16						
12	25-Mar-25	9,640,081			2.11						
			41,634,974								
3 months Totals:											
13	01-Apr-25	9,837,565			2.09						
14	07-Apr-25	8,804,801			2.04						
15	15-Apr-25	10,266,636			2.03						
16	22-Apr-25	10,312,102			1.98						
17	28-Apr-25	9,063,226			1.95						
			48,286,332								
18	05-May-25	8,282,512			1.98						
19	12-May-25	8,760,431			2.00						
20	19-May-25	10,622,325			1.84						
21	27-May-25	11,763,532			1.82						
			39,408,800								
22	03-Jun-25	8,954,817			1.91						
23	09-Jun-25	7,842,393			1.80						
24	16-Jun-25	8,139,282			1.95						
25	23-Jun-25	7,978,364			1.97						
26	30-Jun-25	7,842,583			1.95						
			40,757,439								
6 months Totals:											
27	07-Jul-25	8,000,246			1.95						
28	14-Jul-25	8,387,715			2.00						
29	21-Jul-25	7,919,652			1.95						
30	28-Jul-25	7,336,178			1.93						
			31,651,791								
31	04-Aug-25	6,600,626			2.00						
32	11-Aug-25	7,336,201			2.08						
33	18-Aug-25	7,509,016			2.10						
34	25-Aug-25	6,903,022			1.97						
			28,348,865								
35	01-Sep-25	6,646,309			1.96						
36	08-Sep-25	6,569,733			2.00						
37	15-Sep-25	6,387,163			2.04						
38			19,803,206								
39											
9 months Totals:											
40											
41											
42											
43											
44			-								
45											
46											
47			-								
48											
49											
50											
51			-								
Sale Nos. 1 to 51											
Year end Totals:											

Summary : Sale Averages by Country												
Country :	Year : 2025		Year : 2024		Year : 2025		Year : 2024		Year : 2024		Year : 2023	
	Kilos '000	Av. Prc US\$	Sale Nos: 1 to 34 (8 month)	Sale Nos: 1 to 35 (8 month)	Kilos '000	Av. Prc US\$	Sale Nos: 1 to 35 (8 month)	Sale Nos: 1 to 35 (8 month)	Kilos '000	Av. Prc US\$	Sale Nos: 1 to 35 (8 month)	Sale Nos: 1 to 35 (8 month)
<b>Kenya</b>	<b>257,413,150</b>	<b>2.12</b>	<b>2.12</b>	<b>2.12</b>	<b>296,369,117</b>	<b>2.20</b>	<b>2.20</b>	<b>2.20</b>	<b>37,980,861</b>	<b>0.80</b>	<b>0.80</b>	<b>0.80</b>
<b>Uganda</b>	<b>33,180,185</b>	<b>0.71</b>			<b>3,286,710</b>	<b>0.75</b>			<b>22,787,512</b>	<b>2.54</b>		
<b>Tanzania</b>	<b>2,336,486</b>	<b>0.92</b>			<b>2,487,267</b>	<b>1.73</b>			<b>2,487,267</b>	<b>1.73</b>		
<b>Rwanda</b>	<b>20,004,226</b>	<b>1.61</b>			<b>1,056,101</b>	<b>1.15</b>			<b>1,056,101</b>	<b>1.15</b>		
<b>Burundi</b>	<b>906,946</b>	<b>0.95</b>			<b>45,329</b>	<b>0.76</b>			<b>45,329</b>	<b>0.76</b>		
<b>Malawi</b>	<b>45,329</b>	<b>0.76</b>			<b>45,329</b>	<b>0.76</b>			<b>45,329</b>	<b>0.76</b>		
<b>Mozambique</b>					<b>45,329</b>	<b>0.76</b>			<b>45,329</b>	<b>0.76</b>		
<b>D R Congo</b>					<b>45,329</b>	<b>0.76</b>			<b>45,329</b>	<b>0.76</b>		
<b>Madagascar</b>					<b>45,329</b>	<b>0.76</b>			<b>45,329</b>	<b>0.76</b>		
<b>Ethiopia</b>					<b>45,329</b>	<b>0.76</b>			<b>45,329</b>	<b>0.76</b>		
<b>Total :</b>	<b>314,941,423</b>	<b>1.92</b>			<b>352,911,466</b>	<b>2.07</b>			<b>482,856,000 KGS</b>	<b>2.07</b>		

Year 2024 : 12M	482,556	2.07
Year 2023 : 12M	489,535	2.07
Year 2022 : 12M	516,338	2.33
Year 2021 : 12M	603,893	1.97
Year 2020 : 12M	616,803	1.93
Year 2019 : 12M	454,013	2.04
Year 2018 : 12M	458,361	2.43
Year 2017 : 12M	397,646	2.81
Year 2016 : 12M	407,989	2.29